

**Grantee: Tucson, AZ**

**Grant: B-08-MN-04-0507**

**October 1, 2014 thru December 31, 2014 Performance Report**

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**Grant Number:**

B-08-MN-04-0507

**Obligation Date:****Award Date:****Grantee Name:**

Tucson, AZ

**Contract End Date:****Review by HUD:**

Submitted - Await for Review

**Grant Award Amount:**

\$7,286,911.00

**Grant Status:**

Active

**QPR Contact:**

Joyce Alcantar

**LOCCS Authorized Amount:**

\$7,286,911.00

**Estimated PI/RL Funds:**

\$4,000,000.00

**Total Budget:**

\$11,286,911.00

## Disasters:

**Declaration Number**

NSP

## Narratives

**Areas of Greatest Need:**

Funds have been targeted in census tracts that have been designated as those with high foreclosure rates.

**Distribution and and Uses of Funds:**

The City of Tucson will spend 27.7% of the grant fund meeting the 25% set aside requirement, assisting families earning less than 50% of area median income in the designated target areas.

\$720,000 of the administration funds have been fully obligated.

The balance of the grant has been to purchase foreclosed homes to be sold under a Land Trust model to individuals/families who earn between 50 and 65% of area median income.

**Definitions and Descriptions:****Ensuring Continued Affordability:**

Rental units will be rented through the City of Tucson's El Portal program, with rents not to exceed Low-HOME rents, published annually, as established by HUD. Resale units will be sold through the Pima County Community Land Trust. These sales shall have a 99-year leasehold agreement, automatically renewable for an additional 99 years, with a resale restriction that limits equity to 25%. All initial buyers and subsequent buyers must be between 50% and 80% Area Median Income (AMI). All mortgages shall not exceed 35% of their gross annual income.

**Definition of Blighted Structure:**

Blighted structures shall be defined by reference to the City of Tucson's Neighborhood Preservation Ordinance (NPO) Section 16-14 titled "Dilapidated and Vacant Buildings and Structures; Building and Structures Constituting a Nuisance" and; Section 16-20 titled "Slum Properties, and the definitions section from Arizona Revised Statutes Title 36 - Public Health and Safety Article 3 - Slum Clearance and Redevelopment (1471). (2) and (18) "Blighted Area" and "Slum Area". The City of Tucson will not set aside any NSP 3 funding for demolition.

**Definition of Affordable Rents and Income Limits**

Affordable rents shall not exceed Low HOME rents as defined by HUD by bedroom size. Income limits shall not exceed 50% AMI for rental units, and shall not exceed 80% AMI for home purchasing, as defined and established by HUD.

#### Low Income Targeting:

The City of Tucson will purchase homes to be used as permanent rentals to families earning less than 50% of area median income.

#### Acquisition and Relocation:

#### Public Comment:

Overall	This Report Period	To Date
Total Projected Budget from All Sources	N/A	\$11,286,911.00
Total Budget	\$0.00	\$11,286,911.00
Total Obligated	\$88,126.43	\$10,472,641.99
Total Funds Drawdown	\$397,636.30	\$10,414,102.56
Program Funds Drawdown	\$212,978.87	\$7,228,371.57
Program Income Drawdown	\$184,657.43	\$3,185,730.99
Program Income Received	\$88,126.43	\$3,185,730.99
Total Funds Expended	\$115,366.40	\$10,529,468.96
Match Contributed	\$0.00	\$0.00

## Progress Toward Required Numeric Targets

Requirement	Required	To Date
Overall Benefit Percentage (Projected)		0.00%
Overall Benefit Percentage (Actual)		0.00%
Minimum Non-Federal Match	\$0.00	\$0.00
Limit on Public Services	\$1,093,036.65	\$0.00
Limit on Admin/Planning	\$728,691.10	\$825,291.52
Limit on State Admin	\$0.00	\$825,291.52

## Progress Toward Activity Type Targets

## Progress Toward National Objective Targets

National Objective	Target	Actual
NSP Only - LH - 25% Set-Aside	\$1,821,727.75	\$2,765,594.82

## Overall Progress Narrative:

NSP1 - The following is progress thru December 31, 2014:

Original NSP1 grant funds have been expended, leaving Program Income to be utilized for additional home purchases and rehabilitation work.

The City of Tucson has completed the task, exceeding expectations, of purchasing homes within the NSP1 boundaries, then conveying to the Pima County Community Land Trust (PCCLT) for the rehabilitation and sale to qualified buyers.

No Additional homes were purchased this quarter.

NSP1 Program Income funds were used to purchase the final 3 homes last quarter (July - September 2014). The cost of purchasing the homes exceeded the amount available to complete the rehabilitation work for the 3 homes.

The following addresses were purchased with NSP1 Program Income (last quarter), but because they are also located within the NSP3 boundaries, costs for the rehabilitation work will be paid for out of the NSP 3 budget.

Addresses are:

6079 S. Avenue De La Chandelle, Tucson, AZ 85746

>1448 W. Argyle, Tucson, AZ 85746

>1932 W. Nava Drive, Tucson, AZ 85746

The City will not be purchasing additional homes until existing PCCLT housing stock has been rehabilitated and sold to qualified buyers. After homes have been sold and additional program income has been generated, the City will determine whether or not there will be enough funds to purchase additional homes.

The PCCLT has 2 homes that have completed the rehabilitation phase, and are currently on the market. Addresses are:

7423 E. 24th Street, Tucson, AZ 85710

>915 W. Franklin Street, Tucson, AZ 85745

>One home is in rehabilitation phase. Address is:

>1983 W. Cabernet Drive, Tucson, AZ 85746

One home has been sold to a qualified buyer. Beneficiary data is included in this report. Address is:

1513 W. Greenlee Street, Tucson, AZ 85705

>The 25% Set-aside for individuals/families at or below 50% AMI has been exceeded. Program Income is being monitored so that additional rental units can be purchased when required. Rental units are assigned to the City of Tucson's EI Portal rental program. Units are currently available for rent to tenants at or below 50% AMI. There are 25 NSP1 rental units. Of the 25, 2 are vacant with applications pending, and lease up anticipated in February 2015. There was one unit that was occupied during the past quarter, beneficiary data is included in this report.

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## Project Summary

Project #, Project Title	This Report Period	To Date	
	Program Funds Drawdown	Project Funds Budgeted	Program Funds Drawdown
0001, Acquisition General	\$203,548.73	\$10,235,673.07	\$6,736,425.02
0002, NSP Rehabilitation Rental	\$0.00	\$0.00	\$0.00
0004, NSP Rehabilitation Resale	\$0.00	\$0.00	\$0.00
0005, NSP Disposition	\$0.00	\$0.00	\$0.00
0006, NSP Administration	\$9,430.14	\$1,051,237.93	\$491,946.55
9999, Restricted Balance	\$0.00	\$0.00	\$0.00



## Activities

**Project # / Title:** 0001 / Acquisition General

**Grantee Activity Number:** 9535

**Activity Title:** Acq/Rehab

**Activity Category:**

Disposition

**Project Number:**

0001

**Projected Start Date:**

03/23/2009

**Benefit Type:**

Direct Benefit (Households)

**National Objective:**

NSP Only - LH - 25% Set-Aside

**Activity Status:**

Under Way

**Project Title:**

Acquisition General

**Projected End Date:**

04/15/2010

**Completed Activity Actual End Date:**

**Responsible Organization:**

City of Tucson - EI Portal Rental Program, managed by The

**Overall**

**Total Projected Budget from All Sources**

**Oct 1 thru Dec 31, 2014**

N/A

**To Date**

\$2,765,594.82

**Total Budget**

\$0.00

\$2,765,594.82

**Total Obligated**

(\$31,999.70)

\$2,723,595.12

**Total Funds Drawdown**

\$2,011.88

\$2,723,595.12

**Program Funds Drawdown**

\$2,011.88

\$2,042,133.58

**Program Income Drawdown**

\$0.00

\$681,461.54

**Program Income Received**

\$26,802.51

\$240,717.51

**Total Funds Expended**

\$0.00

\$2,723,595.12

City of Tucson - EI Portal Rental Program, managed by The

\$0.00

\$0.00

City of Tucson1

\$0.00

\$2,723,595.12

**Match Contributed**

\$0.00

\$0.00

**Activity Description:**

Acquisition and rehabilitation of 17 foreclosed properties under the NSP for use as permanent rentals for client households that earn under 50% AMI.

These properties will be managed by the City of Tucson EI Portal program. While still owned by the City of Tucson, an outside agency manages the homes. All new leases of these 17 homes will be to households below 50% AMI.

**Location Description:**

Tucson, Arizona

**Activity Progress Narrative:**

During this quarter, there were not any expenditures, although \$2,011.88 was drawn to cover expenditures not perviously draw down from prior quarters.  
 During this quarter, \$26,802.51 was received from the City of Tucson's El Portal rental program, and receipted as program Income.

## Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	0	25/17

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	22/17
# of Multifamily Units	0	0/0
# of Singlefamily Units	0	22/17

## Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Permanent Jobs Created	0	0	0	0/0	0/0	0/0	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	1	0	1	26/17	0/0	26/17	100.00
# Renter Households	1	0	1	26/17	0/0	26/17	100.00

## Activity Locations

Address	City	County	State	Zip	Status / Accept
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## Other Funding Sources Budgeted - Detail

### No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	



<b>Grantee Activity Number:</b>	<b>9537</b>
<b>Activity Title:</b>	<b>Acq/Rehab</b>

**Activity Category:**

Disposition

**Activity Status:**

Under Way

**Project Number:**

0001

**Project Title:**

Acquisition General

**Projected Start Date:**

03/23/2009

**Projected End Date:**

04/15/2010

**Benefit Type:**

Direct Benefit (Households)

**Completed Activity Actual End Date:****National Objective:**

NSP Only - LMMI

**Responsible Organization:**

Pima County Community Land Trust (PCCLT)

**Overall****Oct 1 thru Dec 31, 2014****To Date****Total Projected Budget from All Sources**

N/A

\$7,470,078.25

**Total Budget**

\$0.00

\$7,470,078.25

**Total Obligated**

\$190,502.68

\$6,903,185.49

**Total Funds Drawdown**

\$378,379.70

\$6,865,215.92

**Program Funds Drawdown**

\$201,536.85

\$4,694,291.44

**Program Income Drawdown**

\$176,842.85

\$2,170,924.48

**Program Income Received**

\$61,323.92

\$2,870,910.91

**Total Funds Expended**

\$111,901.43

\$6,977,117.35

Pima County Community Land Trust (PCCLT)

\$111,901.43

\$6,977,117.35

**Match Contributed**

\$0.00

\$0.00

**Activity Description:**

Acquisition, rehabilitation and disposition of 37 foreclosed homes for resale to client households earning up to 80% AMI through the Pima County Community Land Trust. The Land Trust will have a land lease on these homes for 99 years, automatically renewable for an additional 99 years, that will maintain long-term affordability. The owners may not convey the home without Pima County Community Land Trust involvement and may only receive 25% of equity, if any, in addition to full return of their investment, if proceeds from a future sale allow.

**Location Description:**

Tucson Arizona

**Activity Progress Narrative:**

The amount drawn this quarter was \$378,379.70, and covers previous quarter's expenditures (which had not been drawn). This quarter's expenditures totaled \$111,901.43, which will be drawn during the next quarter.

**Accomplishments Performance Measures**

	<b>This Report Period</b>	<b>Cumulative Actual Total / Expected</b>
	<b>Total</b>	<b>Total</b>
<b># of Properties</b>	0	38/37



	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	34/37
# of Singlefamily Units	0	34/37

## Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Permanent Jobs Created	0	0	0	0/0	0/0	0/0	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	1	1	27/37	8/0	35/37	100.00
# Owner Households	0	1	1	27/37	8/0	35/37	100.00

## Activity Locations

Address	City	County	State	Zip	Status / Accept
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## Other Funding Sources Budgeted - Detail

### No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	

## Project # / Title: 0002 / NSP Rehabilitation Rental

<b>Grantee Activity Number:</b>	<b>9536</b>
<b>Activity Title:</b>	<b>NSP Rehabilitation Rental</b>

### Activity Category:

Rehabilitation/reconstruction of residential structures

### Project Number:

0002

### Projected Start Date:

03/23/2009

### Benefit Type:

Direct Benefit (Households)

### National Objective:

NSP Only - LH - 25% Set-Aside

### Activity Status:

Cancelled

### Project Title:

NSP Rehabilitation Rental

### Projected End Date:

04/15/2010

### Completed Activity Actual End Date:

### Responsible Organization:

City of Tucson - EI Portal Rental Program, managed by The





Overall	Oct 1 thru Dec 31, 2014	To Date
Total Projected Budget from All Sources	N/A	\$0.00
Total Budget	\$0.00	\$0.00
Total Obligated	\$0.00	\$0.00
Total Funds Drawdown	\$0.00	\$0.00
Program Funds Drawdown	\$0.00	\$0.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
City of Tucson - El Portal Rental Program, managed by The	\$0.00	\$0.00
Match Contributed	\$0.00	\$0.00

### Activity Description:

Rehabilitate 10 dwelling units purchased from NSP funds to be used as rental units for households that earn under 50% AMI.  
UPDATE: rehab zeroed out and moved to Acquisition activity.

### Location Description:

Tucson, Arizona

### Activity Progress Narrative:

## Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	0	2/0

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	2/0
# of Singlefamily Units	0	2/0

## Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	7/0	0/0	7/0	100.00
# Renter Households	0	0	0	7/0	0/0	7/0	100.00

### Activity Locations

No Activity Locations found.

## Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found



**Other Funding Sources****Amount**

No Other Funding Sources Found

Total Other Funding Sources

**Project # / Title: 0006 / NSP Administration****Grantee Activity Number: 9123****Activity Title: NSP Administration****Activity Category:**

Administration

**Activity Status:**

Under Way

**Project Number:**

0006

**Project Title:**

NSP Administration

**Projected Start Date:**

03/23/2009

**Projected End Date:**

04/15/2010

**Benefit Type:**

N/A

**Completed Activity Actual End Date:****National Objective:**

N/A

**Responsible Organization:**

City of Tucson1

**Overall****Oct 1 thru Dec 31, 2014****To Date****Total Projected Budget from All Sources**

N/A

\$1,051,237.93

**Total Budget**

\$0.00

\$1,051,237.93

**Total Obligated**

(\$70,376.55)

\$845,861.38

**Total Funds Drawdown**

\$17,244.72

\$825,291.52

**Program Funds Drawdown**

\$9,430.14

\$491,946.55

**Program Income Drawdown**

\$7,814.58

\$333,344.97

**Program Income Received**

\$0.00

\$74,102.57

**Total Funds Expended**

\$3,464.97

\$828,756.49

City of Tucson1

\$3,464.97

\$828,756.49

**Match Contributed**

\$0.00

\$0.00

**Activity Description:**

Administration of NSP for Tucson, Arizona

**Location Description:**

Tucson, Arizona.

**Activity Progress Narrative:**

This quarter's expenditures for administration costs were \$3,464.97, to cover salaries and fringe benefits of staff who work on the NSP1 grant program.  
Amount drawn this quarter was \$17,244.72, and covers the prior quarter's expenditures.

### Accomplishments Performance Measures

No Accomplishments Performance Measures found.

### Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

### Activity Locations

No Activity Locations found.

### Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

#### Other Funding Sources

Amount

No Other Funding Sources Found

Total Other Funding Sources

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